Estate Planning Lawyer

Location: Any Canadian Common Law Jurisdiction

Division: IG Financial Planning

IGM Financial Inc. is one of Canada's leading diversified wealth and asset management companies with approximately $271 billion in total assets under managements. The company provides a broad range of financial planning and investment management services to help more than two million Canadians meet their financial goals. Its activities are carried out principally through IG Wealth Management and Mackenzie Investments

Under IGM Financial's unique business model based on leading brands and multi-channel distribution strategy, we're IG Wealth Management. For over 90 years of business, we have grown to become one of the largest most respected companies in Canada. We are a leader in providing the best advice, experience and outcomes for our clients, personalized throughout their lifetime.

At IG Wealth Management, our vision is to inspire financial confidence.

This is your opportunity to build a career with a leading organization where you can learn, grow and thrive both professionally and personally. **We are proud to be recognized as one of Canada's Top Employers by Mediacorp Canada Inc. for empowering our employees with the tools to thrive while working remotely, while also providing resources to ensure physical and mental wellness were put front and center.**

You will join a team that believes our success starts with the success of our clients, while working together as a team to realize our greatest potential. You will join a team that strives towards excellence while developing and sharing skills and knowledge. You can make a difference for our clients, the world around us and be part of a team that cares. We are dedicated to offering a hybrid work environment when applicable.

IG Wealth Management is a diverse workplace committed to doing business inclusively - this starts with having a representative workforce! We encourage applications from all qualified candidates that represent the diversity present across Canada – including racialized persons, women, Indigenous persons, persons with disabilities, 2SLGBTQIA+ community, gender diverse and neurodiverse individuals, as well as all who may contribute to the further diversification of ideas.

The **Advanced Financial Planning** department is a growing team of 47 legal, tax, and financial planning professionals responsible for providing support, training and resource material to IG Advisors. The support provided includes estate planning, tax planning and financial planning software support on complex cases. Members of the department provide support to high-net-worth clients, particularly those with complex situations, by meeting with them (either remotely or in person) to discuss tax and estate planning issues, opportunities and strategies, as well as liaising with the client's external professionals to co-ordinate the planning where necessary.

We are looking for an estate planning **lawyer** (Director) to join our Advanced Financial Planning team. We are open to **considering candidates located in all provinces outside Québec**. Although work can be conducted remotely, there will be an expectation of periodic travel to meet in person with the team, IG Advisors and with high-net-worth clients.

Responsibilities:

- Provide estate planning, estate taxation, marital property and other financial planning support for IG Wealth Advisors by responding to their questions or issues by telephone and e-mail.
- Review wills, powers of attorney, trust documents, co-habitation agreements, shareholders agreements and other legal documentation to identify issues, concerns and planning opportunities.
- Prepare written reports (based on detailed analysis) for complex client situations, advising on estate, tax and other financial planning opportunities, strategies and issues.
- Analyze financial plans for potential legal issues in client situations, particularly those involving business owners and private corporations.
- Able to work independently and undertake meetings or conference calls with clients and/or their professional advisors on matters relating to estate planning and tax.
- Present concepts and deliver continuing education sessions to advisors and within the Advanced Financial Planning team.
- Develop and provide advice and training to other IG Wealth Management departments on estate planning, marital property, estate taxation and other financial planning issues (including the review of corporate materials, advertisements, client collateral relating to financial planning, participating on editorial committees for production of client publications, advising on new product development and on the appropriateness of various financial planning solutions).

- Complete the Certified Financial Planner ("CFP") designation with FP Canada if not already obtained.

Requirements:

- Minimum 8 years experience in estate planning and taxation, with a preference for completion of additional industry related education (examples could include the Trust and Estate Practitioner designation or the CPA Canada in-depth tax course) and experience in delivering advice to owner/managed businesses and/or high-net-worth individuals.
- Completion of a post-secondary university degree plus attainment of a professional legal designation.
- A continuous learner who stays on top of business trends and changes in the law.
- Flexible, able to work with light supervision and adapt to change.
- Strong verbal and written communication skills (ability to communicate in both English and French would be an asset).
- Strong public speaking and training skills.
- Proficiency with Windows environment PC based tools.

Please visit our career page by clicking on the following link: https://www.ig.ca/en/careers

We thank all applicants for their interest in IG Wealth Management; however only those candidates selected for an interview will be contacted.

IG Wealth Management is an accessible employer committed to providing a barrier free recruitment experience. If you require an accommodation or this information in an alternate format at any stage of the recruitment process, please reach out to the Talent Acquisition team who will work with you to meet your needs.

Please apply by **February 28, 2025.**